ASSET MANAGEMENT

Broadridge®

ProxyEdge®: Simplify proxy voting from start to finish

MANAGE, TRACK, EXECUTE AND REPORT EVERY VOTE ON A SINGLE PLATFORM

- Tap into the world's largest proxy voting network.
- Save time and effort with automated account setup.
- Establish standing vote instructions at the proposal, meeting type and market level.
- Never miss a vote, thanks to convenient alerts and notifications.
- Gain easy access to integrated research, proprietary analytics and third-party recommendations.
- Satisfy CSA requirements and adhere to due diligence best practices.

STEP UP TO NEXT-GENERATION PROXY VOTING

Add more value without adding more work. We make it easy to streamline the management of every meeting, regardless of market or custodian. Our enhanced ProxyEdge® platform simplifies and automates the entire process from voting to reporting, including record maintenance and vote disclosure.

Create and execute informed vote instructions using data-driven, customizable templates, third-party research and recommendations, or your own policy guidelines. Flag key meetings, markets, accounts or proposals with advanced custom alerts. Automated account setup enables you to add new custodial banks and brokers with ease. Now you can offer better service to your clients—and be confident in every vote, every time.

PUT INDEPENDENT INSIGHT AT YOUR FINGERTIPS

ProxyEdge is purpose-built to provide direct access to independent research, helping you simplify due diligence and maximize compliance. Our agnostic platform seamlessly integrates subscription-based research reports and vote recommendations from leading research and advisory firms, as well as Broadridge's own proprietary vote instruction and research tool.

Because Broadridge distributes and processes 99% of all proxies, we deliver a unique, independent view of the entire industry. Broadridge® Proxy Policies and Insights give you access to unmatched insight and analysis based on historical proxy data and public regulatory filings. With PPI, you can identify and benchmark your policies against key industry trends to ensure every decision aligns with client best interests.

CURRENT RESEARCH PROVIDERS AND THEIR COVERAGE

INTEGRATED RECOMMENDATION PROVIDER	MARKETS COVERED
Australian Council of Superannuation Investors Limited (ACSI)	Australia
DSW	Germany
Egan-Jones	Global
European Corporate Governance Service (ECGS)	Europe
Frontis Governance	Italy
Glass, Lewis & Co.	Global
Governance Visions	Japan
InGovern Research Services	India
Institutional Investor Advisory Services India Limited (IiAS)	India
Interfaith Council on Corporate Responsibility (ICCR)	United States
Nordic Investor Services	Sweden, Norway, Finland, Denmark
PIRC	United Kingdom
ProxInvest	France
SHARE	Canada
Stakeholders Empowerment Services (SES)	India

EXPEDITE REPORTING

On-demand audit history helps ensure voting consistency and can be used to present proxy report cards to your board or clients. Customize reports in an instant by proposal category and date range. See how your votes compare to your policy, instructions and management recommendations. Also ask about ProxyDisclosure®, a solution designed to help companies easily and accurately perform all the tasks associated with CSA disclosure compliance.

CHOOSE FROM THREE SERVICE LEVELS TAILORED TO YOUR NEEDS

Whether you require basic functionality or need full access, our system is designed for maximum flexibility and control. We make it easy to add independent research reports, Broadridge Proxy Policy and Insights and much more. The integrated vote recommendation service provides direct access to subscription-based research reports and vote recommendations from industry experts.

MORE CHOICE. LESS EFFORT. GREATER VALUE.

FEATURES	STANDARD	PREMIER	INTEGRATED RECOMMENDATION SERVICE
Paper Reduction	√	√	√
Voting Views & Options	√	√	√
Email Alerts	√	√	√
Reporting	√	√	√
Multiple User Access & Customization	√	√	√
Advanced Voting Options		√	√
Policy Management		√	√
Advanced Standing Instructions		√	√
Record Keeping & Advanced Reporting		√	√
Custom Alerts		√	√
Vote Recommendations			√
Research Reports			√

Contact us

For a detailed demonstration or more information, please contact us at +1 855 252 3822 or visit our website at broadridge.com/ca.

Broadridge, a global Fintech leader with over $4 billion in revenues and part of the S&P 500® Index, provides communications, technology, data and analytics. We help drive business transformation for our clients with solutions for enriching client engagement, navigating risk, optimizing efficiency and generating revenue growth.

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Ready for Next

Communications
Technology
Data and Analytics

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